Saskatchewan
Tourism and
Small Business

TRAVEL MARKETS FOR SASKATCHEWAN'S TOURISM INDUSTRY

NORTH DAKOTA REPORT

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EXECUTIVE SUMMARY

This report describes a number of characteristics typical of the North Dakota out-of-state travel market and examines Saskatchewan's current and future projected performance in this market in terms of market share and market image.

Saskatchewan captures about 5.1% of the out-of-state travel by North Dakotans.

This study observes that North Dakota residents are interested in a broad range of pleasure travel activities such as rural and urban sightseeing, visiting historic sites/museums, attending festivals/events, camping, fishing, hiking, wilderness canoeing and other activities. Many of these activities could be pursued in Saskatchewan.

North Dakotans tend to primarily visit Saskatchewan for purposes of friends and relatives, followed by rural/urban sightseeing, camping, fishing, hiking and wilderness canoeing.

1.0 EXISTING OUT-OF-STATE TRAVEL PROFILE OF NORTH DAKOTA RESIDENTS

1.1 Market Size

The North Dakota market generates approximately 2,000,000 out-of-state trips annually to other U.S. states, Canadian provinces and other countries. Table 1 shows the distribution of these person-trips.

TABLE 1

Distribution of Out-of-State Trips Taken in Canada by Residents of North Dakota

	1982 Person Trips[1]	North Dakota Residents Who Have Travelled to These Destinations Between 1980 - 83[2]
Saskastchewan	104,000	11%
Manitoba	442,000	27%
Alberta	52,000	7%
British Columbia	52,000	4%

[1]Thorne, Stevenson & Kellogg
[2]Mid-Continent Research Inc.

Table 1 reveals that Saskatchewan currently is the second Canadian province most popular for travellers from North Dakota. Saskatchewan's share of the out-of-state travel from North Dakota is about 5.1%.

1.2 Market Characteristics

1.2.1 Trip Purpose

The majority of out-of-state trips taken by North Dakota residents are for pleasure travel purposes. As shown in Table 2, trips taken for pleasure purposes amount to 49% of all trips taken. North Dakota residents have a lower propensity to take pleasure trips than do residents of Minnesota. Travel for purposes of visiting friends and/or relatives, is second in importance with the North Dakota market.

TABLE 2

Main Reason for Trips by North Dakota, Montana and Minnesota Residents, 1980-83[1]

Trip Purpose	North Dakota	Montana	Minnesota
Pleasure	49%	49%	60%
Visiting Friends/Relatives	41%	47%	35%
Both Business and Pleasure	22%	22%	19%
Business	2%	3%	2%
Other	2%	1%	-

[1]Mid-Continent Research Inc. study of the North Dakota market.

NOTE: Percentages may not add to 100% due to rounding or to multiple responses.

1.2.2 Activities Pursued on Pleasure Trips

Table 3 shows the relative popularity of 19 major activities often pursued by tourists of North Dakota, Montana and Minnesota on pleasure trips. Of all the pleasure activities listed, the five most popular with North Dakota travellers include rural sightseeing, historical sites/museums, urban sightseeing, festivals or special events and musical events or live theatre.

TABLE 3

Specific Interests of North Dakota, Montana and Minnesota
Travellers on Pleasure Trips

Trip Purpose	All State[1] Average	North Dakota	Montana	Minnesota
Rural Sightseeing	79%	79%	77%	80%
Historical Sites/Museums	85%	88%	88%	80%
Urban Sightseeing	75%	78%	73%	75%
Festivals/Special Events	62%	60%	56%	69%
Musical Events/Live Theatre	56%	61%	54%	52%
Craft/Art Fairs	42%	43%	40%	42%
Camping	54%	51%	64%	48%
Water Sports	40%	41%	42%	38%
Sporting Events	47%	45%	52%	45%
Hiking	36%	27%	39%	41%
Fishing	48%	46%	55%	43%
Industrial Tours	24%	30%	21%	21%
Downhill Skiing	24%	21%	29%	22%
Sailing	12%	11%	10%	15%
Wilderness Canoeing	16%	12%	16%	19%
Cross-Country Skiing	15%	9%	16%	19%
Snowmobiling	17%	17%	19%	14%
Hunting Game Bird	21%	22%	20%	20%
Hunting Big Game	22%	19%	31%	17%

[1]Average for all three states.

1.2.3 Trip Frequency

The majority of North Dakota residents undertake one pleasure trip annually of four or more nights duration.

TABLE 4

Percentage Distribution of the Number of Annual Pleasure Trips of Four or More Nights Duration by Residents of North Dakota, Montana and Minnesota

Number of Pleasure Trips of 4+ Nights	All State[1] Average	North Dakota	Montana	Minnesota
0	8%	8%	7%	9%
1	41%	44%	40%	40%
2	26%	27%	25%	26%
3	10%	9%	11%	11%
4	6%	6%	7%	5%
5 or more	9%	7%	10%	9%

[1]Average for all three states.

NOTE: Percentages may not add up to 100% due to more than one mode of transportation used.

1.2.4 Transportation Modes for Pleasure Travel

North Dakota travellers for long distance trips prefer using the automobile when on a pleasure trip.

TABLE 5

Modes of Transportation Used by North Dakota, Montana and Minnesota Residents on Long Distance, Out-of-State Pleasure Trips

Transportation Mode	All State[1] Average	North Dakota	Montana	Minnesota
Automobile	51%	53%	57%	43%
Airplane	43%	37%	37%	54%
Train	2%	3%	4%	-
Bus	4%	4%	5%	3%
Van/RV/Camper	4%	4%	5%	4%
Other	2%	2%	3%	2%

[1]Average for all three states.

NOTE: Percentages may not add up to 100% due to more than one mode of transporation used.

1.2.5 Accommodation Used on Pleasure Trips

Table 6 displays the type of accommodation used by North Dakota travellers when on pleasure trips. Homes of friends/relatives are the dominant type of accommodation (48%) used by North Dakota travellers.

North Dakota travellers are typically more likely to stay with friends and relatives as compared to Minnesota travellers.

TABLE 6

Accommodation Used by North Dakota, Montana and Minnesota Travellers on Pleasure Trips

Type of Accommodation	All State[1] Average	North Dakota	Montana	Minnesota
Hotels/Motels	43%	42%	40%	47%
Friends/kelatives	45%	48%	50%	38%
Camping	10%	10%	10%	11%
Resorts	3%	4%	2%	4%
Other	6%	4%	4%	9%

[1]Average for all three states.

1.2.6 Trip Planning Behaviour by North Dakota Residents

The main months in which North Dakota residents start planning their summer pleasure trips are January, March and May. However, June is the primary month in which North Dakota travellers decide on their destination. Table 7 further illustrates when summer trips are planned and when a decision on destination is made.

It is interesting to note that 36% of North Dakota travellers do not plan on taking a summer pleasure trip.

TABLE 7

Summer Trip Planning and Trip Destination Decision by North Dakota Residents

Month	Month When Summer Trip is Planned	Month	Month When Destination is Decided for Summer Trip
January	12%	January	2%
February	4%	February	2%
March	10%	March	6%
April	8%	April	4%
May	10%	May	16%
June	6%	June	14%
July	3%	July	7%
August	2%	August	3%
September	2%	September	1%
October	1%	October	-
November	-	November	-
December	-	December	-
Don't Know	7%	Don't Know	10%
Do Not Take Summer Pleasure Trip	36%	Do Not Take Summer Pleasure Trip	36%

The pattern of who makes decisions about a vacation destination in North Dakota are somewhat different to the patterns found in Minnesota. The husband and wife jointly decide in 44% of the households, the whole family deciding in about 10% of the households, the male head deciding in 13%, and the female head in 9% of the households. The major difference between Minnesota and North Dakota is that the joint husband/wife and mother/father plays a substantially greater role in the vacation decision process.

Table 8 shows that North Dakota residents tend to use travel agents to plan vacations.

For those who use travel agents, convenience and arrangements for air tickets and hotel reservation were the primary reasons for using travel agents.

TABLE 8

Use of Travel Agents and Packaged Tours
by North Dakota Travellers

Use of Travel Agents in Past 3 Years to Plan/Arrange Pleasure Trips

Yes = 42% No = 58%

Reasons Why:

Convenience	18%
Information/Guidance	2%
Cheap Trip	6%
Know Agent	-
Air Ticket and Hotel Reservation	7%
Other/Not Sure	10%
Did Not Use Travel Agent	58%

Use of Package Tours in Past 3 Years

Yes = 15% No/No Answer = 85%

Reasons Why:

More Economical	6%
Convenience	4%
Pre-Arranged	2%
Group Tour	4%
Other/Not Sure	1%
Did Not Use Package	85%

2.0 PERFORMANCE OF THE SASKATCHEWAN TOURISM INDUSTRY IN THE NORTH DAKOTA MARKETPLACE

2.1 Saskatchewan's Market Share of North Dakota Out-of-State Travellers

According to Thorne, Stevenson & Kellogg estimates, North Dakota residents undertook 2,000,000 out-of-state person-trips to other destinations. Saskatchewan captured 104,000 person-trips or 5.1% market share.

2.2 Primary Travel Motivators in the North Dakota Market

Travel for pleasure is typically the single most common motivator associated with travel by North Dakota residents. The other main travel motivator is visiting friends and relatives.

TABLE 9

Selected Travel Motivators/Activities of North Dakota Long Distance Travellers, 1980 - 83

Motivators/Activities	North Dakota Travellers
Pleasure	49%
Visiting Friends/Relatives	41%
Business and Pleasure	22%
Business	2%
Other	2

NOTE: Percentages do not add to 100% since more than one travel/motivator/activity is required to induce travel.

2.3 Motivators for Pleasure Trips to Saskatchewan by North Dakota Residents

Table 10 shows the activities which comprised the main travel purposes of North Dakota residents travelling to Saskatchewan on their most recent pleasure trip. The main activities which are pursued in Saskatchewan by North Dakota residents include primarily urban and rural sightseeing, fishing, camping and attending festivals/events.

Saskatchewan tends to attract the outdoor-oriented pleasure traveller from North Dakota. Table 11 further illustrates what activities North Dakota residents look for on a pleasure trip relative to the activities they undertake in Saskatchewan. As Table 11 shows, although North Dakota travellers rank rural sightseeing, urban sightseeing, visiting historic sites, attending festivals/events, etc., high on their preferred activities, while in Saskatchewan their participation is low in the activities they enjoy doing.

TABLE 10

Main Purpose of Activity Pursued on Last Pleasure Trip to Saskatchewan

Purpose	All State[1] Average	North Dakota	Montana	Minnesota
Rural Sightseeing	41%	39%	50%	34%
Historical Sites	2%	-	6%	-
Urban Sightseeing	25%	25%	22%	27%
Festivals	6%	11%	6%	-
Camping	14%	11%	11%	20%
Water Sports	2%	-	6%	-
Sporting Events	4%	-	11%	-
Musical Events	1%	4%	-	-
Fishing	17%	25%	6%	19%
Hiking	5%	-	-	15%
Craft/Art Fairs	2%	-	6%	-
Downhill Skiing	-	-	-	-
Industrial Tours	-	-	-	-
Cross-Country Skiing	-	-	-	-
Sailing	-	-	-	-
Snowmobiling	-	-	-	-
Wilderness Canoeing	3%	-	-	8%
Big Game Hunting	4%	-	6%	6%
Game Bird Hunting	2%	-	-	6%

[1]Average for all three states.

TABLE 11

Comparison of Activities Sought on a Pleasure Trip by
North Dakota Residents and Their Activity Participation in Saskatchewan

Activities Sought by North Dakota Residents on a Pleasure Trip		North Dakota Visitors Who Participate in Saskatchewan in These Activities
Rural Sigthseeing	79%	39%
Historical Sites/Museums	88%	-
Urban Sightseeing	78%	25%
Festivals/Events	60%	11%
Musical Events	61%	4%
Craft and Art Fairs	43%	-
Camping	51%	11%
Water Sports	41%	-
Sporting Events	45%	-
Hiking	27%	-
Fishing	46%	25%
Industrial Tours	30%	-
Downhill Skiing	21%	-
Sailing	11%	-
Wilderness Canoeing	12%	-
Cross-Country Skiing	9%	-
Snowmobiling	17%	-
Game Bird Hunting	22%	-
Big Game Hunting	19%	-

2.4 Length of Stay by North Dakota Visitors to Saskatchewan

Table 4 shows that 44% of North Dakota pleasure travellers normally take at least one pleasure trip lasting four or more nights away from home. Table 12 shows that of all North Dakota travellers taking trips to Saskatchewan, 54% stayed at least four nights on their last pleasure trip to Saskatchewan.

TABLE 12

Percent of Trips Taken by North Dakota Travellers to Saskatchewan Lasting at Least Four or More Nights Away from Home

Length of Trip	To Saskatchewan
Three Nights or Less	46%
Four or More Nights	54%

2.5 Type of Accommodation Used by North Dakota Residents on Trips to Saskatchewan

TABLE 14

Type of Accommodation Used by North Dakota Travellers on Last Pleasure Trip and in Saskatchewan on Last Pleasure Trip

Accommodation	Last Long Distance Pleasure Trip	Last Pleasure Trip to Saskatchewan
Hotels/Motels	42%	54%
Friends/Relatives	48%	11%
Camping	10%	25%
Resorts	4%	7%
Other	4%	-
Passed-Through	-	7%

In the case of travel to Saskatchewan, North Dakota residents tend to stay more in hotels/motels and in campgrounds. This is reflective of their interest in outdoor recreation and urban sightseeing.

2.6 Mode of Travel Used by North Dakota Residents When Travelling to Saskatchewan

Table 5 noted that North Dakota residents display a significantly greater tendency to use the automobile when travelling on long distance pleasure trips, as compared to Minnesota.

Trips taken to Saskatchewan by North Dakota residents, however, are stronger-oriented to the use of the private automobile as the primary transportation mode. Table 15 compares mode of transport used by North Dakota pleasure travellers on long distance pleasure trips and to Saskatchewan.

TABLE 15

Modes of Transport Used by North Dakota Pleasure Travellers on Long Distance Pleasure Trips and to Saskatchewan

Transport Mode	Long Distance Pleasure Trips	Trips to Saskatchewan
Automobile	53%	96%
Airplane	37%	4%
Train	3%	-
Bus	4%	-
Other	6%	-

2.7 Party Size Characteristics of North Dakota Residents Travelling to Saskatchewan

According to the 1983 Mid-Continent Study of the North Dakota market, the average party size was 3.9.

TABLE 16

Party Size of North Dakota Pleasure Travellers to Saskatchewan

Party Size	Percent
1	4
2	14
3	21
4	21
5	25
6 or more	14
Average	**3.9**

TABLE 17

Comparison of Party Size for North Dakota, Montana and Minnesota

State	Average Party Size
North Dakota	3.9
Montana	3.7
Minnesota	4.1

2.8 Travel Market Image of Saskatchewan as Held by North Dakota Residents

Approximately 39% of North Dakota residents gave Saskatchewan a positive rating. This is somewhat higher than the positive image given to Saskatchewan by Montana or Minnesota residents.

An astonishing 41% of North Dakota residents "don't know anything" about Saskatchewan given that the state borders with Saskatchewan. This is due to a lack in the past of Saskatchewan's presence in the North Dakota marketplace and, secondly, that more North Dakota residents tend to visit Manitoba.

North Dakota residents tend to view Saskatchewan positively in terms of scenery and friendly people. The most negative perception held about Saskatchewan was that it is very flat and uninteresting with no pretty scenery.

When asked to describe Saskatchewan as a place for pleasure or business travel, 56% of North Dakota residents gave it a favourable rating, 5% an unfavourable rating, while 38% "did not know" or "did not know anything about Saskatchewan".

Table 18 and Table 19 provide a detailed breakdown of North Dakota residents image or perception of Saskatchewan.

TABLE 18

Perceptions Held of Saskatchewan by North Dakota Residents - If Asked by a Friend

Favourable Mentions	39%
° Just wilderness I suppose/Full of prairies and open space/ Prairies and flat country like Montana/North Dakota	4%
° Nice place to go/Great place to spend a week/Been there and would recommend going there/You should visit there, check it out/A nice place to visit	11%
° I heard it's beautiful/I think it is real pretty in the summer/It has a lot of scenery/Very scenic/It is a very pretty place/The scenery is beautiful	15%
° There's farming there/Good farm land/Agricultural area/It's grain country/Grow a lot of wheat	2%
° I'd love to go there/I'd like to go there/I would like to see it	3%
° Good fishing/Good hunting/Good fishing and hunting	6%
° Friendly people/The people are hospitable/Friendly/Nice people	9%
° Have relatives there/Was born there/Own property there/ Have friends there	2%
° Regina is a very interesting place to visit/Regina is worth a visit/I liked Regina/Regina is a nice city	3%
° Mentioned a specific thing to see/Place to see/Thing to do	4%
° Lots of things to do there/Lots to see/Lots of shops	2%
° Good lakes/Nice lakes/Lot of lakes/Big lakes/Cold clear lakes	2%
° Other favourable mentions	5%
Unfavourable Mentions	6%
° It's not really very scenic/Very flat and uninteresting/No pretty scenery	4%
° Very cold in the winter/It's cold/Don't like the cold weather	-
° Other unfavourable mentions	2%
° I have never been there	14%
° Don't know anything about it/Have no idea what it's like	41%
° Never heard of Saskatchewan	-

TABLE 19

Perceptions of Saskatchewan as a Place for Pleasure
or Business Travel by North Dakota Residents

Favourable Mentions	56%
° I understand that Saskatchewan is a beautiful place to travel - lots of scenery/The scenery is very pretty/Very nice countryside/The pretty scenery/Beautiful like the rest of Canada	13%
° Fine for pleasure/It would be a pleasure to go there/I'd like to go there/For pleasure, it's great/Good place to get away from it all/ Definitely a relaxing place to go	14%
° Nice place/Hear it's a nice place to go/Friends and relatives like it/ Sounds like a nice place	15%
° For the sportsman it is great/It's probably good duck hunting/It's good hunting territory/Probably outdoorsy/Good fishing and hunting	12%
° Should be suitable for business/Very good place for business	3%
° Plenty of things to see/Good for sightseeing/Interesting place to visit/ Interesting to go there	4%
° Nice people there/People are friendly/Hospitable	4%
° Farm country/Lots of wheat fields/It's got a lot of farm land	-
° Seen advertisements/On TV looks like a nice place to visit/Recall some advertisements for there	1%
° Clean/Clean - no litter/Clean and tidy countryside	1%
° Lakes/Nice lakes/Have lots of lakes	1%
° I think of the wilderness/It is fairly wilderness yet - we like the wilderness and camping	2%
° Other favourable mentions	6%
° It's okay/All right/It's average/Can't be too bad/Sounds okay	3%
Unfavourable Mentions	5%
° No attraction for me to go there - not too much to do/Not my kind of place/Nothing there I like to do or see	1%
° I wouldn't go there/Not interested/Not a place I would want to be (no reason given)	-
° Flat/Just prairies	-
° Don't like the scenery/Not pretty scenery there	-

TABLE 19 (cont'd)

Unfavourable Mentions

° Prefer somewhere else/like Alberta better/Minnesota is better/ It's not number one on my list	1%
° Other unfavourable mentions	2%
° Don't know/Don't know anything about it	38%

When those North Dakota residents who had travelled on a pleasure trip to Saskatchewan were asked to describe what they liked best about the province, "scenery" and "nice/friendly people" and a "specific place or event" were the most often mentioned as is outlined in Table 20. When they were asked what they liked the least about their pleasure trip to Saskatchewan, "weather" and "high costs" were most frequently mentioned factors as noted in Table 21.

TABLE 20

Positive Impressions of Saskatchewan Held by North Dakota Residents Based on Most Recent Trip to Saskatchewan

Aspects Liked Best	Percent
Liked Everything	39
The Scenery	39
Nice/Friendly People	21
Specific Place or Event	39
Visiting Friends/Relatives	11
Good Fishing	21
Clean Cities	7

TABLE 21

Negative Impressions of Saskatchewan Held by North Dakota Residents Based on Most Recent Trip to Saskatchewan

Aspects Liked Least	Percent
Nothing Liked	-
Flat Countryside	-
Rainy/Windy/Cold Weather	11
High Costs	18

Saskatchewan's market image in North Dakota can be summarized as follows:

- A high level of lack of awareness (38%) of Saskatchewan in general and more specifically what Saskatchewan offers in terms of tourism attractions and services for pleasure or business travel.
- As a destination for pleasure or business travel, 56% of North Dakota residents gave Saskatchewan a favourable rating which is higher than a 50% favourable rating by Montana residents, and a 45% favourable rating by Minnesota.
- Those North Dakota residents who visited Saskatchewan, rate the province highly on its scenery and friendly people. Of the aspects least liked, these North Dakota residents were most likely to dislike the weather and high costs.

3.0 POTENTIAL MARKET FOR TRAVEL TO SASKATCHEWAN

The previous two chapters of this report described a number of characteristics typical of the North Dakota out-of-state travel market and examined Saskatchewan's level of performance in this market in terms of market share and market image.

It was noted, for example, that Saskatchewan, in 1982, captured 5.1% (104,000 person-trips) of the out-of-state travel by North Dakota residents within Canada.

North Dakota residents are interested in a variety of pleasure travel activities such as rural sightseeing, urban sightseeing, visiting historical sites/museums, attending festivals and events and craft and art fairs. Saskatchewan can compete with the North Dakota market for such activities as urban sightseeing, rural sightseeing, festivals/events, fishing, camping and other outdoor recreational opportunities.

3.1 Long-Term Outlook for Growth in North Dakota's Out-of-State Travel Markets

North Dakotans took approximately 4.3 million trips in 1982 to all destinations, including foreign destinations.

In the analysis of the North Dakota market undertaken by Thorne, Stevenson & Kellogg for a preparation of the Saskatchewan Tourism Strategy, it was noted that total person-trips by North Dakota residents are expected to increase about 1.5% from 1982 to 1987, or 66,000 trips under optimistic economic conditions and at worst decline by 0.8% by 1987.

3.2 Forecast of Potential Travel Market for Saskatchewan from North Dakota to 1987

If Saskatchewan maintained its historical market share of about 5.1% of North Dakota's out-of-state travel markets, Saskatchewan could expect travel by North Dakotans to Saskatchewan to grow from the 104,000 person-trips in 1982 up to 106,000 person-trips in 1987, using the high scenario and remain at about current level by 1987 using the low scenario.

NOTE: High scenario represents a 1.5% growth rate.
Low scenario represents an 0.8% decline.

The North Dakota survey conducted by Mid-Continent Research, Inc. in 1983 found that 30% of North Dakotans were either "very" or "somewhat" likely to travel to Saskatchewan on a pleasure trip in the next year or two. This level of interest in travel to Saskatchewan was greater than the likelihood expressed by Montana and Minnesota residents.

TABLE 22

Percent of North Dakota, Montana and Minnesota
Indicating Likelihood of Visit to
Saskatchewan in the Next Year or Two

Level of Likelihood	North Dakota	Montana	Minnesota
Very Likely	15%	8%	9%
Somewhat Likely	15%	17%	19%
Total % Disposed to Travel to Saskatchewan	30%	25%	28%

3.3 Reasons for Likelihood of North Dakota Residents to Visit Saskatchewan

The 1983 market survey conducted by Mid-Continent Research, Inc., also examined the "reasons" that North Dakota residents stated they were either likely or not likely to visit Saskatchewan. The reasons given for probable travel to Saskatchewan by North Dakotans were, in order of importance, some place different to go, visiting friends and/or relatives and fishing/hunting.

TABLE 23

Reasons North Dakota Residents are Likely to Travel
to Saskatchewan in the Next Year or Two
(All Mentions)

Reason	Percent
Explore New Place/See the Scenery	12
Visit Friends/Relatives	6
"Passing Through"	2
Camping/Touring	3
Go Every Year	2
Fishing/Hunting	6
Other	9
Total	**40**

North Dakota residents who reported being unlikely to visit Saskatchewan felt this way for the following reasons: nothing to do there/rather go someplace else first; no friends or relatives to visit there; and no interest in visiting Saskatchewan.

TABLE 24

Reasons North Dakota Residents are Not Likely to Travel
to Saskatchewan in the Next Year or Two
(Total Mentions)

Reasons	Percent
Rather go Somewhere Else/Nothing to Do There	25
No Interest	8
No Relatives/Friends	10
Money Problems	6
Lack of Knowledge About Saskatchewan	4
No Time/Too Busy	6
Too Old/Health Reasons	5
Too Far Away	3
Other	4
Total	**71**

In terms of those who reported that they were "not too likely" to visit Saskatchewan, only 4% stated that it was due to lack of knowledge. The predominant reasons, such as "nothing to do/rather go somewhere else" and "no interest in going there" are probably in all likelihood attributable to a lack of knowledge about Saskatchewan's tourism attributes and to no significant marketing/promotional efforts in the North Dakota marketplace.

3.4 Factors Most Likely to Influence Travel by North Dakota Residents to Saskatchewan

Table 25 shows the factors which would motivate North Dakota residents to travel to Saskatchewan in the next year or two. The main motivator would be a good fishing or hunting package. Other motivators include a price for value package tour, a special major event, etc. Only 4% mentioned they would be influenced by more specific information about activities/sightseeing opportunities and 2% mentioned brochures or other forms of advertising/promotion.

TABLE 25

Factors Most Likely to Influence Travel to Saskatchewan by North Dakotans in Next Year or Two (Total Mentions)

Factor	Percent
If I Had Friends/Relatives to Visit	5
If Friends/Relatives Were Going	6
A Good Fishing or Hunting Experience	13
Good Priced Package Tour	2
More Specific Information	4
Special Event/Activity	5
Curiosity/Just to Go There	6
Brochure/Advertising/Promotion	2
Someone's Recommendation	-
Extra Cash	11
If Remarkable Scenery was Available	6
Nothing	23
Other	17
Don't Know	11
Total	**111**

3.5 Potential Size of Markets for Specific Activities

Table 26 provides a breakdown of the potential size of the market in North Dakota for specific Saskatchewan activities. Table 26 shows that the promotion of a package of specific activities/attractions can be associated with influencing a greater influx of Ontario visitors to Saskatchewan. Specific activities/attractions such as fishing, hunting, and urban/rural sightseeing, should be packaged and promoted in the North Dakota marketplace.

TABLE 26

Existing and Projected Growth to 1987 in the North Dakota Market for Selected Pleasure Travel Activities in Saskatchewan

Travel Activity	North Dakota Residents Interested in Activity	Size of Market in 1982 Person-Trips	Existing Market Captured	Projected Maximum Market Available by 1987 for Sask.*	Increase
Rural Sightseeing	79%	40,560	39%	41,170	610
Historical Sites	88%	-	-	-	-
Urban Sightseeing	75%	26,000	25%	26,390	390
Festivals/Events	62%	11,450	11%	11,620	170
Camping	54%	11,450	11%	11,620	170
Water Sports	40%	-	-	-	-
Sporting Events	47%	-	-	-	-
Musical Events	56%	4,160	4%	4,200	60
Fishing	48%	26,000	25%	26,390	390
Hiking	36%	-	-	-	-
Craft/Art Fairs	42%	-	-	-	-
Downhill Skiing	24%	-	-	-	-
Industrial Tours	24%	-	-	-	-
Cross-Country Skiing	15%	-	-	-	-
Sailing	12%	-	-	-	-
Snowmobiling	15%	-	-	-	-
Wilderness Canoeing	16%	-	-	-	-
Big Game Hunting	22%	-	-	-	-
Game Bird Hunting	21%	-	-	-	-

*Based on high scenario of 1.5% growth between 1982 and 1987.

3.6 Characteristics of North Dakota Visitors to Canada

According to Thorne, Stevenson & Kellogg:

- North Dakota travellers to Canada are from all age groups, and from the middle and upper income brackets. The North Dakota Vacation Travel Survey shows a relatively even split among travellers in the 18 - 35 year (21%), 35 - 49 year (26%), and 50 - 64 year (21%) age brackets. Travellers from the 65+ age group were less represented (14%), but their number as a proportion of total travellers to Canada, has increased considerably more than that of any other age group (from 9% of total travellers in 1981, to 14% in 1982).

- The greatest number of North Dakota travellers to Canada (31%) are also in the $25,000+ income bracket. The next most important income bracket is the $15,000 - $24,000 range which accounts for 21% of travellers to Canada (1977 U.S. dollars).

- Saskatchewan appears to be their second most preferred Canadian destination. Saskatchewan has consistently been a province of destination for about 4% or 5% of travellers from North Dakota. Manitoba has consistently been the prime Canadian destination.

4.0 CONSIDERATIONS AND IMPLICATIONS FOR MARKETING AND PROMOTIONAL STRATEGIES

Previous chapters of this report have noted a number of important aspects of the North Dakota travel market for Saskatchewan. The primary reasons why North Dakotans visit Saskatchewan is for purposes of rural/urban sightseeing, fishing, camping and for events/festivals. Although North Dakotans have a wide range of pleasure travel interests, they tend to pursue only a few predominant activities when travelling in Saskatchewan.

Forecasts of the potential travel volumes to Saskatchewan from North Dakota found that there is likely to be a small growth occurring in the North Dakota travel marketplace over the next several years and that marketing activities undertaken prior to 1987 should provide Saskatchewan with a reasonable opportunity to increase its share of the existing North Dakota travel market.

4.1 Improvements Required to Saskatchewan's Market Image in North Dakota

As many as 38% of North Dakota residents have "no image" of Saskatchewan.

There is a need to create an image of Saskatchewan as a desirable place to vacation in on the basis of Saskatchewan's tourism resources and attractions. This will require the diversity of Saskatchewan's natural resources; urban centres, friendly people, and depend on specific places and attractions for pursuing activities which are of interest to the North Dakota traveller.

4.2 Existing Awareness of Specific Attractions

Table 27 shows the awareness of selected Saskatchewan attractions in the North Dakota market.

TABLE 27

Awareness of Saskatchewan Places, Attractions and Events by North Dakotans

Place/Attraction/Event	Level of Awareness
Regina	91%
Saskatoon	80%
Moose Jaw	79%
Regina Royal Canadian Mounted Police Training Depot and Museum	48%
Pioneer Days, Saskatoon	44%
Churchill River	25%
Prince Albert National Park/ Waskesiu	39%
Moose Mountain Provincial Park/ Kenosee	29%
Grasslands	22%
Regina Buffalo Days Exhibition	40%
Cypress Hills Provincial Park	18%
Lake Diefenbaker	12%
Lac La Ronge Provincial Park	17%
Qu'Appelle Valley	12%
Fort Walsh National Historic Park	10%
Batoche	5%
None of These - Not Heard of Any	2%

The cities enjoy the highest level of awareness in North Dakota, but the specific attractions available in those centres should be strongly promoted in the North Dakota market.

It is interesting to note that natural features such as the Qu'Appelle Valley and Cypress Hills, and such historic sites as Batoche, have a low level of awareness in the North Dakota market.

This would suggest that Saskatchewan's marketing/promotional activities focus first on creating a favourable or positive image of Saskatchewan as a desirable vacation place with a wide-range of topography and "things to do and see". The second marketing/promotional thrust should be on specific activities:

- urban sightseeing
- rural sightseeing
- fishing/hunting
- camping
- special major events
- specific attractions in Regina and Saskatoon

4.3 Promotional Media for Encouraging Travel to Saskatchewan by North Dakota Residents

Table 28 shows the sources of ideas about places to go for pleasure travel as reported by North Dakota residents. As expected, word of mouth references from friends or relatives is the most dominant factor in terms of where people got their ideas for pleasure travel. Magazines, newspapers and television followed in order of importance.

TABLE 28

Source of Ideas About Places to Go

Source	Percent
Friends/Relatives	62
Newspapers	17
Magazines	26
Travel Agency/Travel Brochures	4
Television	17
Decide Myself/Our Own Ideas/What We Want to Do/Where We Want to Go	4
In the Mail	8
Radio	9
Chamber of Commerce/Travel Show/ Information Booth/Tours Through	2
Books/The Library/Encyclopedias	4
Automobile Club	2
Visit Relatives/Visit Family	3
Other Mentions	1
Don't Know	2

Tables 29, 30 and 31 illustrate the type of media North Dakota residents read or listen to.

TABLE 29

Daily Newspaper North Dakotans Read on a Regular Basis

Newspaper	Percent	City Size					Income				Sex	
		Under 5000	5 to 50M	50 to 100M	100 to 500M	500M Over	Under 20000	20000-29999	30000-39999	40000 Over	Men	Women
Fargo Forum	27	26%	11%	45%	88%	100%	25%	28%	12%	44%	27%	27%
Minot Daily News	19	27%	21%	8%	-	-	24%	14%	35%	15%	13%	23%
Bismarck Tribune	16	10%	21%	18%	-	-	13%	21%	19%	12%	19%	14%
Grand Forks Herald	12	10%	15%	18%	-	-	16%	12%	8%	6%	18%	9%
Williston Daily Herald	6	6%	9%	-	-	-	2%	9%	15%	12%	4%	7%
Jamestown Sun	6	7%	7%	-	-	-	6%	2%	-	6%	4%	6%
Wall Street Journal	4	2%	3%	8%	13%	-	2%	-	4%	18%	7%	2%
Dickinson Press	4	2%	8%	-	-	-	2%	4%	8%	6%	4%	4%
U.S.A. Today	4	3%	3%	3%	13%	-	2%	5%	4%	6%	7%	2%
Minneapolis Tribune	2	1%	-	5%	13%	-	-	4%	-	9%	3%	1%
Other Mentions	10	11%	15%	-	-	-	13%	9%	8%	15%	11%	9%
None - Don't Read a Daily Paper	10	14%	5%	8%	13%	-	11%	11%	4%	3%	9%	10%

TABLE 30

Magazines Read Regularly by North Dakota Residents

Magazine	Percent
	40
Sports Illustrated	19
Readers Digest	12
Time	-
MacLean's	-
Chatelaine	7
National Geographic	12
Newsweek	4
Women's Magazines	2
Regional Magazines	15
Good Housekeeping	3
Home and Garden Magazines	8
Sports Magazines	9
McCall's	9
Better Homes and Gardens	3
General Interest Magazines	10
Ladies Home Journal	4
Business and Finance Magazines	6
People	2
Science Magazines	9
U.S. News & World Report	3
Trade, Technical and Professional Journals	3
Cosmopolitan	5
Family Circle	6
Redbook	6
Woman's Day	4
Outdoor Life	2
Life	6
Farming and Farm Life Magazines	2
Sports Afield	4
Field and Stream	2
Popular Mechanics	3
Farm Journal	1
The Farmer	2
Money	20
Other Magazines	15
None - Don't Read Any Magazines	

TABLE 31

Radio Stations Listened to Most Often by North Dakota Residents

Radio Station	Percent	City Size					Income				Sex	
		Under 5000	5 to 50M	50 to 100M	100 to 500M	500M Over	Under 20000	20000-29999	30000-39999	40000 Over	Men	Women
KFYR - AM	10	10%	12%	5%	-	-	8%	14%	12%	3%	10%	9%
WDAY - AM	4	6%	1%	5%	-	50%	3%	4%	4%	-	6%	3%
KFGO - AM	4	2%	1%	8%	19%	-	1%	7%	-	12%	7%	2%
KCJB - AM	4	5%	4%	-	-	-	4%	4%	4%	-	1%	5%
KQWB - AM	2	1%	-	8%	6%	-	2%	-	4%	6%	1%	2%
KSJB - AM	2	1%	2%	-	6%	-	1%	2%	-	3%	1%	2%
KKXL - AM	1	-	3%	-	-	-	1%	-	-	3%	1%	1%
KNOX - AM	1	-	2%	3%	-	-	-	-	-	6%	1%	1%
KLTC - AM	1	1%	2%	-	-	-	2%	2%	-	-	3%	-
KEYZ - AM	1	2%	-	-	-	-	-	-	-	6%	1%	1%
Other AM Stations	21	26%	18%	18%	19%	50%	26%	21%	15%	18%	23%	20%
WDAY AM & FM	1	1%	-	3%	6%	-	-	2%	-	6%	1%	1%
KIZZ - FM	6	4%	9%	3%	-	-	9%	5%	8%	-	4%	6%
Y93 - FM	5	5%	4%	8%	-	-	1%	9%	8%	6%	6%	4%
WDAY - FM	2	2%	-	8%	-	-	-	5%	-	6%	2%	2%
KCCM - FM	2	-	-	5%	13%	-	-	4%	-	3%	3%	1%
KVOX - FM	2	-	-	3%	19%	-	2%	2%	4%	-	1%	2%
KFYR - FM	2	3%	-	-	-	-	2%	-	-	-	-	2%
Other FM Stations	21	19%	29%	13%	6%	-	26%	14%	31%	12%	16%	23%
Don't Know/It Varies	3	5%	2%	3%	-	-	5%	2%	4%	-	4%	2%
None - Don't Listen	8	6%	9%	8%	6%	-	6%	5%	8%	12%	7%	9%

4.4 Timing and Promotional Activities

Section 1.2.6 of Chapter 1 of this report, gave details of the summer trip planning characteristics of North Dakotans. It was noted that January, March and May are important months for planning summer pleasure trips.

5.0 CONCLUSIONS

The following conclusions can be drawn about the North Dakota market for Saskatchewan based on the data and analysis contained in this report.

5.1 Saskatchewan captures 5.1% of North Dakota's out-of-state travel, with the North Dakota market more heavily-oriented to Saskatchewan's rural/urban sightseeing, fishing and camping.

5.2 The North Dakota market is expected to grow about 1.5% between 1982 and 1987 based on an optimistic economic scenario.

5.3 To penetrate the North Dakota market promote clusters of urban attractions and outdoor recreational opportunities.

5.4 Although North Dakota residents have a high awareness of Saskatchewan cities such as Regina, Saskatoon and Moose Jaw, their awareness of attractions/events within the cities is relatively low.

APPENDIX A
METHODOLOGY

A. THE SAMPLE

Information was required on the travel behaviour of residents of North Dakota and especially on those who travel 800 km. (500 miles) or more which is of sufficient distance to travel to Saskatchewan.

The study was concerned with trips taken by individuals 18 years of age or older, and data was collected on travel patterns of North Dakota residents for the past three years.

A disproportionate sampling procedure was designed to yield a sample of 250 completed interviews for metropolitan and rural North Dakota.

The Kish respondent selection system was used to select the proper household member. Six different versions of the Kish respondent selection system were utilized to insure randomness of sample.

To ensure representativeness of the sample, up to three dialing attempts at different times of day and on different days of the week, were made to complete an interview at a designated household. If, after three attempts, an interview could not be completed at a designated household, an alternate was substituted.

For results based on a sample of this size, with a 95% confidence level, the error is $\pm$3%.